New York's 529
Advisor Guided
College Savings Program

New York's 529 Advisor-Guided College Savings Program
PO Box 55498 | Boston, MA 02205-5498

Questions?

Customer Care: 1-800-774-2108
Monday through Friday, 8 a.m. to 7 p.m. ET.
Email:
ny.529advisor@jpmorgan.com
Internet Access at:
www.ny529advisor.com

CRAIG S FORSTER
36 OVERBROOK DR
MILLWOOD NY 10546-1033

Dealer Name: Wells Fargo Clearing Services, LLC
Rep. Name: Unknown Wells Fargo Clearing Services
Address: 1525 W W T Harris Blvd Bldg 3
Charlotte NC 28262

Important Year-end Information!

Tax Forms: Contributions to 529 plans do not generate tax forms. However, if you took a withdrawal from your NY 529 plan in 2017, you will receive a 1099-Q tax form. This form will be mailed or made available electronically no later than January 31, 2018, based on your selected account preferences. Tax forms and up-to-date transaction history can be accessed by logging on to www.ny529advisor.com.

State Tax Reporting: Contributions that do not appear on this statement but were submitted online or postmarked by December 31, 2017 may have received a 2017 contribution year for tax reporting purposes. For more up-to-date account information and a complete view of 2017 contributions, review the Transactions section of your account by logging on to www.ny529advisor.com.

It's easy to contribute! Login to www.ny529advisor.com and add to your Advisor-Guided Plan account through Electronic Bank Transfer (EBT) or Automatic Investment Plan (AIP) from your checking or savings account. Contribution checks mailed to the Program address at the top of this statement may be made payable to "New York's 529 Advisor-Guided Program." Please be sure to write the beneficiary's account number on the check. Learn more in the Advisor-Guided Plan Disclosure Booklet and through your financial advisor.

Account Statement

Statement Period
October 1, 2017 - December 31, 2017

Account Owner	Beneficiary	Account #	Account Type
CRAIG S FORSTER	[redacted] FORSTER	[redacted]	Individual 529

Statement Summary

Account Balance Period Beginning (10/01/2017) $461.18
Account Balance Period Ending (12/31/2017) $462.10

	Statement Totals	Year-to-date Totals
Current Year Contributions - All Sources	$0.00	$0.00
Current Year - Fees	$0.00	-$25.00

Investment Summary

Fund Code	Portfolio Name	Units	Unit Price	Value
5758	JPMorgan 529 U.S. Government Money Market Portfolio - C	45.9800	$10.05	$462.10

Total Portfolio Net Worth: $462.10
Principal: $371.43
Earnings: $90.67

0W5833 1M4 22281 P50874 W100032 72384 6TM 777733058-01 PON-P 1171194 UNI2803477-0002228 3

NY's 529 College Savings Program
P.O. Box 55440
Boston, MA 02205-8323

Questions?

Contact NY's 529 Plan: 1-877-697-2837
Monday through Friday
8:00 a.m. to 9:00 p.m. Eastern time.

Email:
NY529@nysaves.org

Internet Access at:
www.nysaves.org

Learn About Upromise at:
http://www.upromise.com/nyd

Craig S Forster
36 Overbrook Drive
Millwood NY 10546-1033

Important Year-end Information!

Tax Forms: Contributions to 529 plans do not generate tax forms. However, if you took a withdrawal from your NY 529 plan in 2017, you will receive a 1099-Q tax form. This form will be mailed or made available electronically no later than January 31, 2018, based on your selected account preferences. Tax forms and up-to-date transaction history can be accessed by logging on to www.nysaves.org.

State Tax Reporting: Contributions that do not appear on this statement but were submitted online or postmarked by December 31, 2017 may have received a 2017 contribution year for tax reporting purposes. For more up-to-date account information and a complete view of 2017 contributions, review the Transactions section of your account by logging on to www.nysaves.org.

Account Statement

Statement Period
October 1, 2017 - December 31, 2017

Account Owner	Beneficiary	Account #	Account Type
Craig S Forster	[redacted]orster	[redacted]	Individual 529

Statement Summary

Account Balance Period Beginning (10/01/2017)			$450.86
Account Balance Period Ending (12/31/2017)			$453.05

	Statement Totals	Year-to-date Totals
Current Year Contributions - All Sources	$0.00	$0.00
Current Year - Withdrawals	$0.00	-$350.00

Investment Summary

Portfolio Name	Units	Unit Price	Value
Interest Accumulation Portfolio	36.5071	$12.41	$453.05

Total Portfolio Net Worth:	$453.05
Principal:	$280.93
Earnings:	$172.12

NY's 529 College Savings Program
P.O. Box 55440
Boston, MA 02205-8323

Questions?

Contact NY's 529 Plan: 1-877-697-2837
Monday through Friday
8:00 a.m. to 9:00 p.m. Eastern time.

Email:
NY529@nysaves.org

Internet Access at:
www.nysaves.org

Learn About Upromise at:
http://www.upromise.com/nyd

Craig S Forster
36 Overbrook Drive
Millwood NY 10546-1033

Important Year-end Information!

Tax Forms: Contributions to 529 plans do not generate tax forms. However, if you took a withdrawal from your NY 529 plan in 2017, you will receive a 1099-Q tax form. This form will be mailed or made available electronically no later than January 31, 2018, based on your selected account preferences. Tax forms and up-to-date transaction history can be accessed by logging on to www.nysaves.org.

State Tax Reporting: Contributions that do not appear on this statement but were submitted online or postmarked by December 31, 2017 may have received a 2017 contribution year for tax reporting purposes. For more up-to-date account information and a complete view of 2017 contributions, review the Transactions section of your account by logging on to www.nysaves.org.

Account Statement

Statement Period
October 1, 2017 - December 31, 2017

Account Owner	[redacted]	[redacted]	Account Type
Craig S Forster	[redacted] Forster	[redacted]	Individual 529

Statement Summary

Account Balance Period Beginning (10/01/2017) $410.06
Account Balance Period Ending (12/31/2017) $412.05

	Statement Totals	Year-to-date Totals
Current Year Contributions - All Sources	$0.00	$0.00
Current Year - Withdrawals	$0.00	-$300.00

Investment Summary

Portfolio Name	Units	Unit Price	Value
Interest Accumulation Portfolio	33.2034	$12.41	$412.05
		Total Portfolio Net Worth:	$412.05
		Principal:	$255.73
		Earnings:	$156.32

137717 TRM 50696 P50887 3100003 227838 STM 387708781-01 PDN P 1715970 [illegible]